

2011 Hong Kong & South China PCB Market Survey Report

2011 香港及華南地區 綫路板市場調查報告

2012 Edition

Published by HKPCA
September 2012

2012 年版

香港綫路板協會
2012年9月出版

Full Version 完整版

Member 會員: 港幣HK\$100

Non member 非會員: 港幣HK\$200

HKPCA
Hong Kong Printed Circuit Association
香港綫路板協會

HKPCA

**HONG KONG & SOUTH CHINA
PCB MARKET SURVEY REPORT
(BRIEF ONLY)**

SEPTEMBER 2011

HKPCA
Hong Kong Printed Circuit Association
香港綫路板協會

PCB Market in HK & South China

Distribution of Plants

Region	South China	#East China	^Areas outside South & East China	Total
No. of plants	66	9	7	82
No. of employees	100,086	5,825	6,155	112,066
Sales Revenue (M USD)	5,314.9	339.9	253	5,908
Per Capita Output Value (USD)	53,103	58,352	41,105	52,718

Source: 2011 HKPCA Market Survey

Remarks

East China regions include Shandong Province, Anhui Province, Jiangsu Province, Zhejiang, Jiangxi, Fujian, Shanghai

^ Other regions include Hunan, Xi'an, Chongqing and overseas

PCB Market in HK & South China

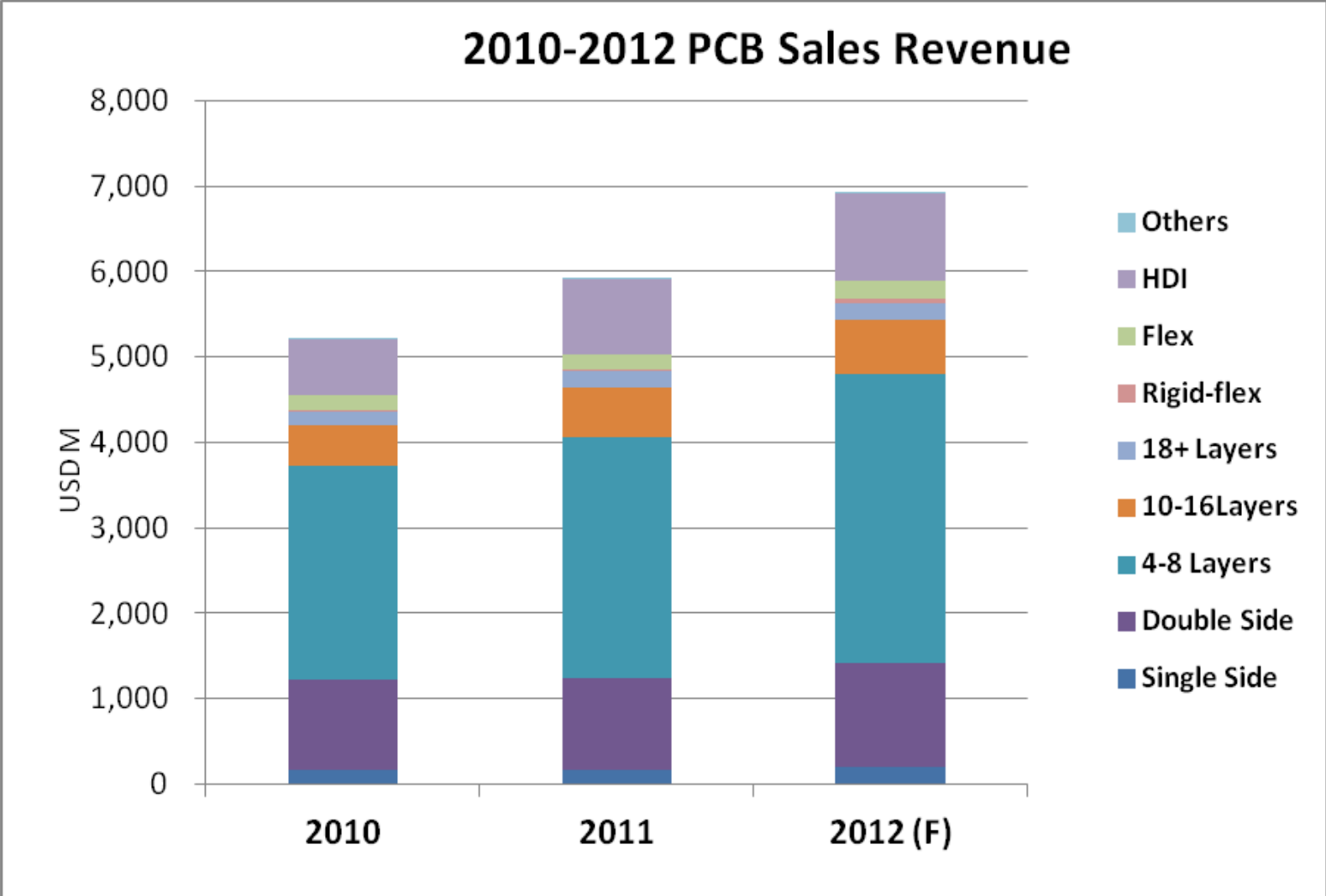
Sales Revenue of Respondents

(MUSD)	Single-side	Double-side	4-8L	10-16L	18L+	Flex-rigid	Flex	HDI	Others	Total
2010	162 (3.1%)	1,067 (20.4%)	2,500 (47.8%)	476 (9.1%)	153 (2.9%)	24 (0.5%)	169 (3.2%)	660 (12.6%)	15 (0.3%)	5,226 (100.0%)
2011	170 (2.9%)	1,074 (18.2%)	2,821 (47.8%)	583 (9.9%)	179 (3.0%)	30 (0.5%)	178 (3.0%)	871 (14.7%)	1.6 (0.0%)	5,908 (100.0%)
2012 (e)	193 (2.8%)	1,230 (17.8%)	3,368 (48.7%)	650 (9.4%)	192 (2.8%)	45 (0.7%)	205 (3.0%)	1,027 (14.9%)	2.3 (0.0%)	6,912 (100.0%)
Growth Change in 2011	5.1%	0.6%	12.8%	22.6%	17.0%	25.3%	5.2%	32.1%	-89.5%	13.0%
Growth Change in 2012(e)	13.6%	14.6%	19.4%	11.4%	7.3%	56.3%	15.2%	17.9%	49.8%	17.0%

Source: 2011 HKPCA Market Survey

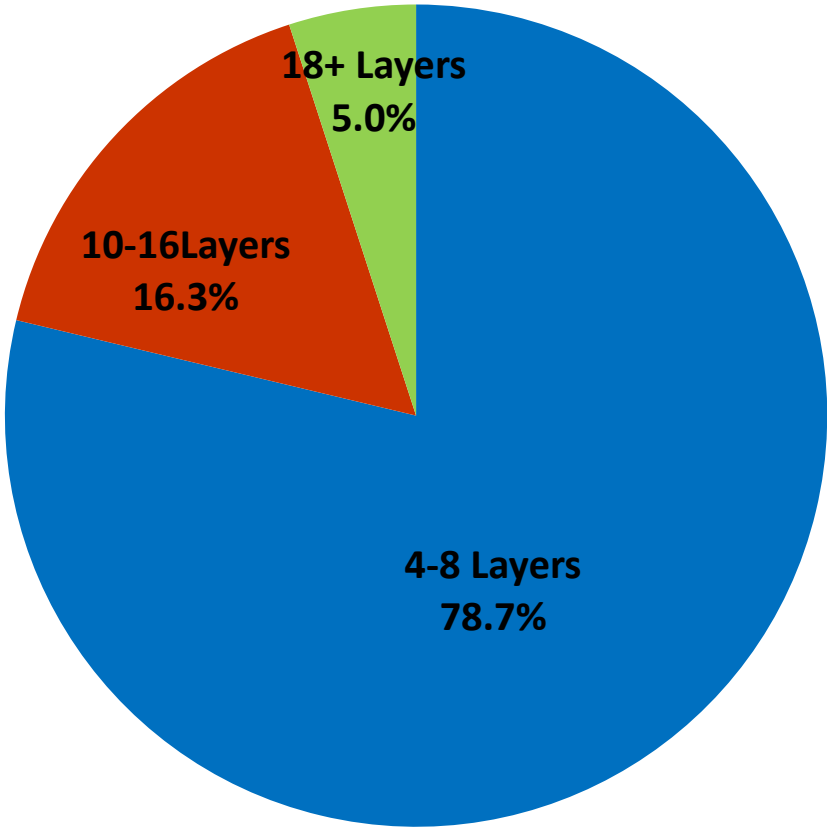
- Based on survey of 45 PCB manufacturers, revenue in USD Million
- Multi-layer board (MLB) and HDI achieved 75.4% share
- 60.7% of MLB is 4 to 8 layers

PCB Market in HK & South China



PCB Market in HK & South China

2011 Multilayer PCB Distribution



Sales Revenue: USD3,583M

HKPCA

Hong Kong Printed Circuit Association

Source: 2011 HKPCA Market Survey

香港綫路板協會

PCB Market in HK & South China

PCB Application of Respondents

(USD M)	PC computer	Peripheral products of Computer	Communication	Communications infrastructure and others	Consumer Electronics	Automotive Electronics	Industry & Medical	Military & Aviation	Others	Total
2010	1,240 (23.7%)		1,626 (31.1%)		705 (13.5%)	667 (12.8%)	737 (14.1%)	76 (1.4%)	175 (3.4%)	5,226 (100.0%)
2011	653 (11.1%)	520 (8.8%)	942 (15.9%)	1,053 (17.8%)	824 (14.0%)	815 (13.8%)	719 (12.2%)	73 (1.2%)	309 (5.2%)	5,908 (100.0%)
2012 (F)	750 (10.9%)	598 (8.7%)	1,198 (17.3%)	1,228 (17.8%)	845 (12.2%)	1,083 (15.7%)	818 (11.8%)	89 (1.3%)	303 (4.4%)	6,912 (100.0%)
Growth Change in 2011	-5.4%		22.7%		16.9%	22.1%	-2.5%	-3.3%	76.2%	13.0%
Growth Change in 2012(F)	14.9%	15.0%	27.2%	16.6%	2.6%	33.0%	13.8%	21.8%	-2.0%	17.0%



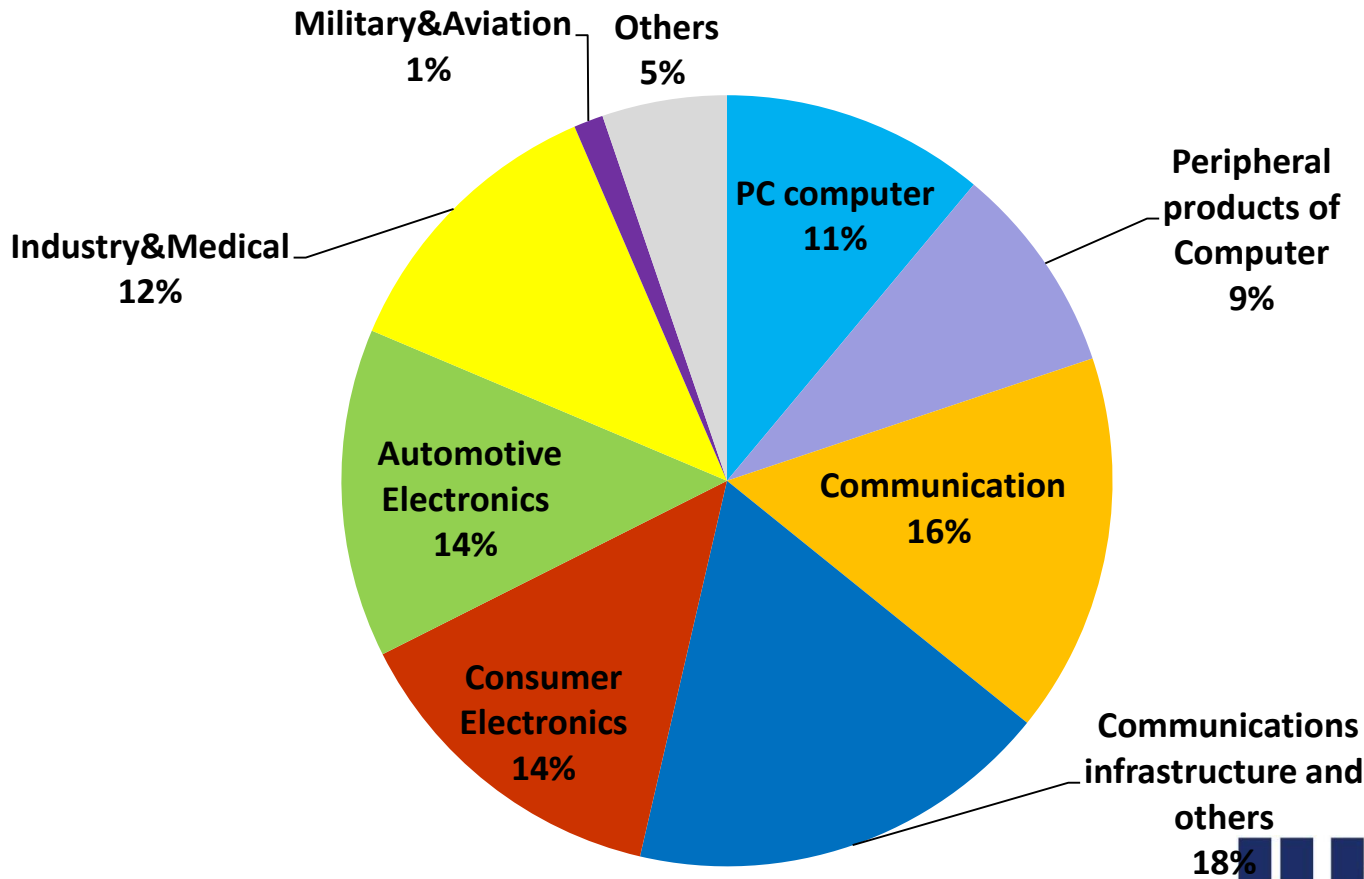
Hong Kong Printed Circuit Association

Source: 2011 HKPCA Market Survey

香港綫路板協會

PCB Market in HK & South China

2011 PCB Application Analysis



Sales Revenue : USD 5,908 M



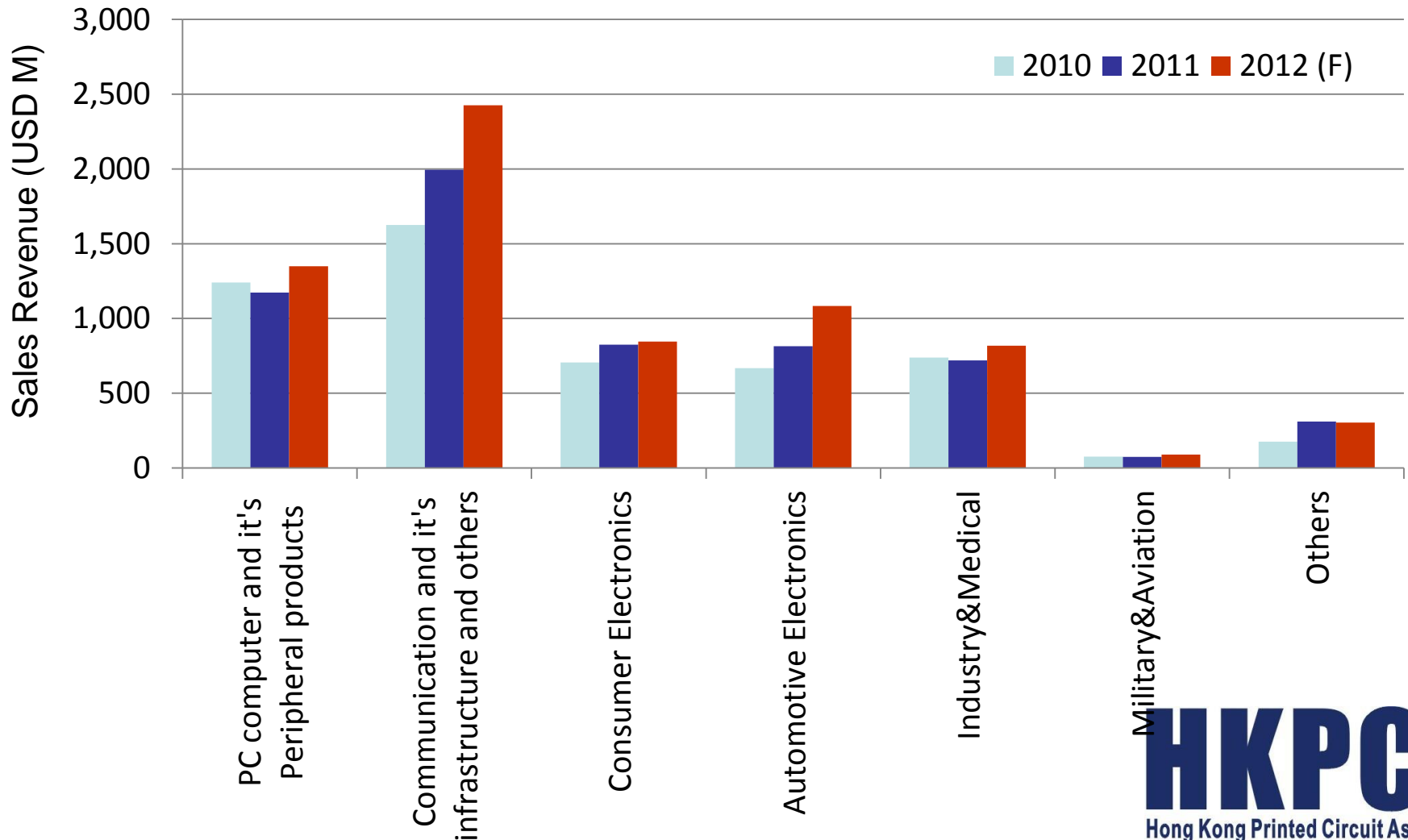
Hong Kong Printed Circuit Association

Source: 2010 HKPCA Market Survey

香港綫路板協會

PCB Market in HK & South China

2010-2012 PCB Application Analysis



HKPCA

Hong Kong Printed Circuit Association
香港綫路板協會

Source: 20101HKPCA Market Survey

Remarks

- Strict environmental regulations and policies
- Consolidations in the PCB industry
- Increasing raw material price, labour costs and operation costs, RMB appreciation
- PCB market is still full of opportunities due to increasing demands such as smart phones and tablet PCs

Contact 聯繫方式

Hong Kong Office 香港秘書處

Tel 電話：852-2155 5099

Fax 傳真：852-2155 9099

Address 地址：

Unit B, 22/F., Legend Tower, 7 Shing Yip Street, Kwun Tong,
Kowloon, Hong Kong

香港九龍觀塘成業街7號寧晉中心22樓B室

PRC Office 深圳辦事處

Tel 電話：755-8624 0033

Fax 傳真：755-8624 0022

Address 地址：

Room A2, 13/F., SZ Development Bank, Nanshan Building, 171 Taoyuan
Road, Nanshan District, Shenzhen

深圳市南山區桃園路171號深圳發展銀行南山大廈13A2室

Website 網址：<http://www.hkpca.org>

Email 電郵：secretary@hkpca.org